CHAPTER FOUR - TABLE OF CONTENTS

LIST OF FIGURES

LIST OF FIGURES (CONTD.)

Page

LIST OF TABLES

Page

4

Architectural and Engineering: Processing an A&E Analysis

Overview   As an approved lender or subcontractor, you will be able to use the DAP system to complete n Architectural and Engineering (A&E) assignment. An A&E analysis is the reporting of the physical characteristics of a project.

The A&E subsystem is used to perform an Architectural and Engineering analysis for the project application being considered. This subsystem allows you to enter the physical characteristics of each property included in the project. The A&E assignment must be completed prior to starting the Cost assignment because relevant information from A&E assignment is imported into the Cost subsystem.

The A&E process functions the same way for all program types.

Key Points

This chapter provides an overview of the A&E subsystem and instructions on how to perform the functions necessary to complete an A&E analysis in DAP. The following topics are covered:

- Retrieving A&E assignments;
- Viewing A&E windows and tabs;
- Processing in the General tab;
- Processing in the Assignment tab;
- Processing in the Site(s) tab;
- Processing in the Unit Composition (Revenue) tab;
- Processing in the Unit Composition (Non Revenue) tab;
- Processing in the Unit Amenities tab;
- Processing in the Project Amenities tab;
- Processing in the Project Services tab; and
- Copying an A&E assignment.

The A&E subsystem is where the A&E Analyst enters information about each site on a property. All structures are documented, including project amenities and services. Detailed information for revenue and non revenue units is entered by unit type.

After logging onto the system, the **Development Application Processing** window (Figure 4-1) displays a Menu bar and Toolbar. See Chapter 2, Section 2.3.1.2, Menu Bar and Tool Bar, for a complete description of each menu option and toolbar icon.

For optimal use, set your monitor display area to 800x600. For more detailed instructions, refer to Chapter 2, Section 2.3.4, Changing Monitor Display.
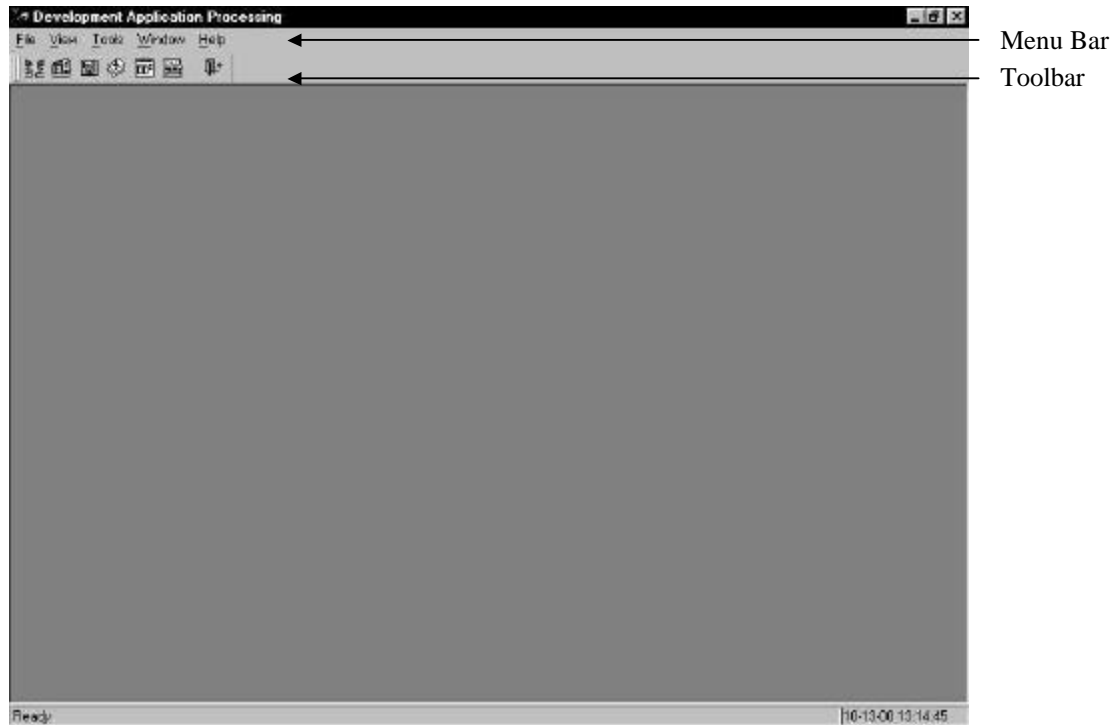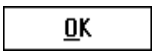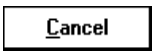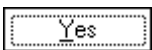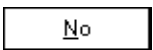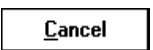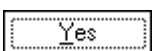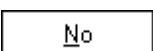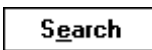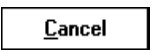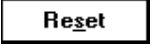
Figure 4-1. Development Application Processing Window

Alternative Options for Command Buttons

The command buttons that display on windows and dialog boxes allow you to execute functions in DAP. When two or more command buttons are available, you can use one to proceed with executing your work and the other to perform a different action. The steps in this guide tell you when to select a command button to complete DAP work. Table 4-1 shows the alternate command buttons that you can optionally use.

Table 4-1. Alternative Options for Command Buttons

When the next step is click . . .	You can optionally click . . .
OK to execute a function (e.g., change project name or project status).	**Cancel** to not complete the action.
Yes to save your work before executing another function (e.g., save before closing, save before exiting).	**No** to not save but still execute the next function. Or **Cancel** to not save and not complete the next function.
Yes to exit DAP.	**No** to stay logged onto DAP.
Search to search the database.	**Cancel** to not search the database. Or **Reset** to delete your search criteria and optionally enter new search criteria.

4.1   Retrieving Assignments

Once an application has been entered into the Tracking subsystem, an assignment is made to the A&E subsystem. Only the individual assigned to the project can enter or edit in an A&E assignment. However, anyone may view the assignment.
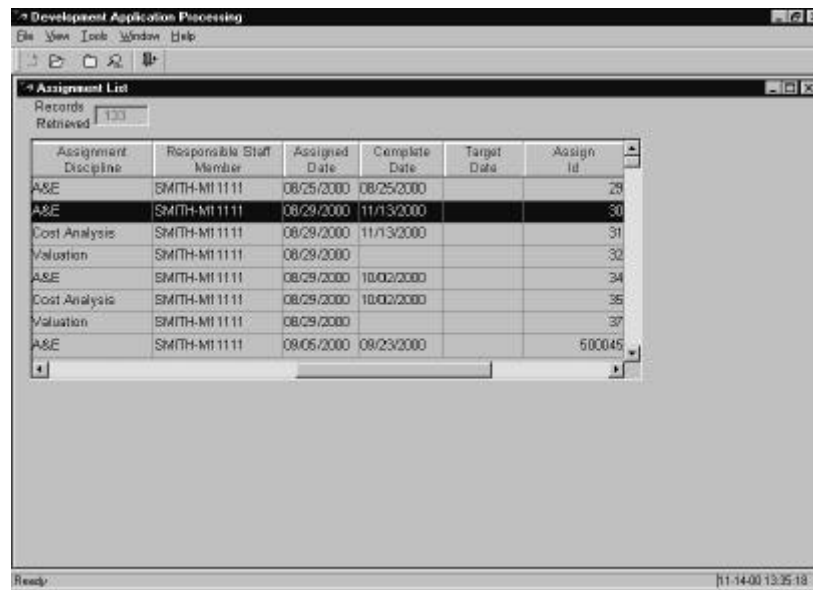
The **Assignment List** window (Figure 4-2 and Figure 4-4) displays the details of current A&E assignments, including *Multifamily Project Name, Version Number, Proj/FHA Number, Assignment Discipline, HUD Staff Name, Staff Field Office, Phase Name, Assigned Date, Complete Date, Target Date, Assign ID, Admin Close, MAP, Official, and Assignment Comments.*

> ✍   *Note: The DAP system links to a national database that includes projects from field offices across the country. The list is extensive, therefore, the system provides you with several criteria to narrow your search. Refer to Section 3.1.10, Retrieving Applications, for details on how to search for a project.*
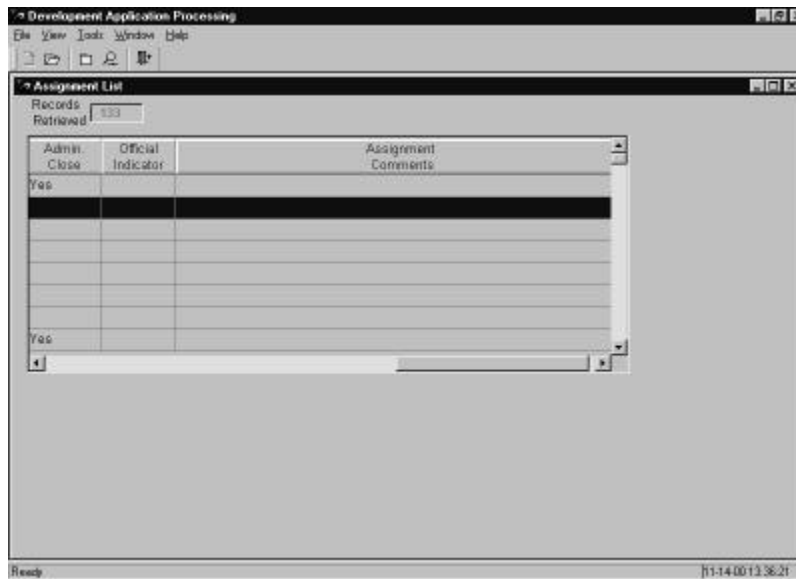
Figure 4-2. Assignment List Window (1 of 3)

Figure 4-3. Assignment List Window (2 of 3)

Figure 4-4. Assignment List Window (3 of 3)

To retrieve the A&E assignment:

1. From the **DAP Main** window, click on **File**, **Open**, **Technical Processing**, and the **Assignment Search** window displays.

2. Enter your search criteria.

3. Select **A&E** as the *Discipline Type*.

4. Click on ⌐ **Search** ⌐, and the **Assignment List** window displays.

To select an A&E assignment:

1. Scroll down the assignment list to view all projects assigned to you.

2. Select the desired A&E assignment from the list.

3. From the **File** menu, select **Open**, and the **General** window displays.

4.2   Processing an A&E Analysis

After you select an A&E assignment from the **Assignment List** window, the A&E subsystem displays the **General** window (Figure 4-5). The Project Name and the Project/FHA Number displays in the header on most subsystem windows. There are eight tabs for processing the A&E analysis, and the system displays the General tab first. To use the tabs on this window, the system requires you to enter the date the analysis will begin. Refer to Section 4.2.1,

Starting and Ending an A&E Analysis.
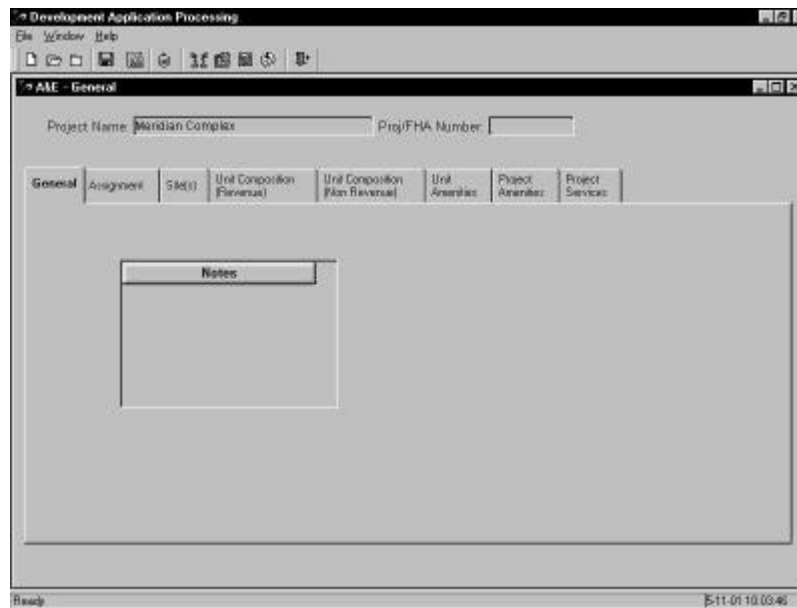
Figure 4-5. General Window

4.2.1   Starting and Ending an A&E Analysis

Before allowing you to enter data in any of the A&E tabs, the system requires a start date. Upon completing the analysis, you must enter a complete date. It is important that you follow the process steps below each time you start and end an analysis.

To process an A&E assignment:

1. Select the Assignment tab and enter the current date in the *Start* field (see Section 4.2.3, Assignment Tab).

2. Save your work.

3. Select the General tab and enter your A&E notes (see Section 4.2.2, General Tab).

4. Save your work.

5. Select the remaining tabs and enter your A&E data.

6. Complete the A&E analysis.

7. Select the Assignment tab and enter the current date in the *Complete* field
    (see Section 4.2.3, Assignment Tab).

8. Save your work.

✍   *Note: After you enter the complete date and save your work, the system will not allow you to change any of the data, including your notes. You can only view data in the A&E assignment.*

4.2.2   General Tab

The General tab on the **General** window (Figure 4-6) is where you enter A&E notes about a project. Up to five separate entries can display in the Notes list box. The first 15 characters will display for each note entry. A vertical scroll bar displays whenever there are six or more entries. Other DAP users can only view your notes. You can add, edit, copy, and paste entries. You can also delete items and restore or undo the deleted items. The restore feature must be used *before* you save a deleted item.
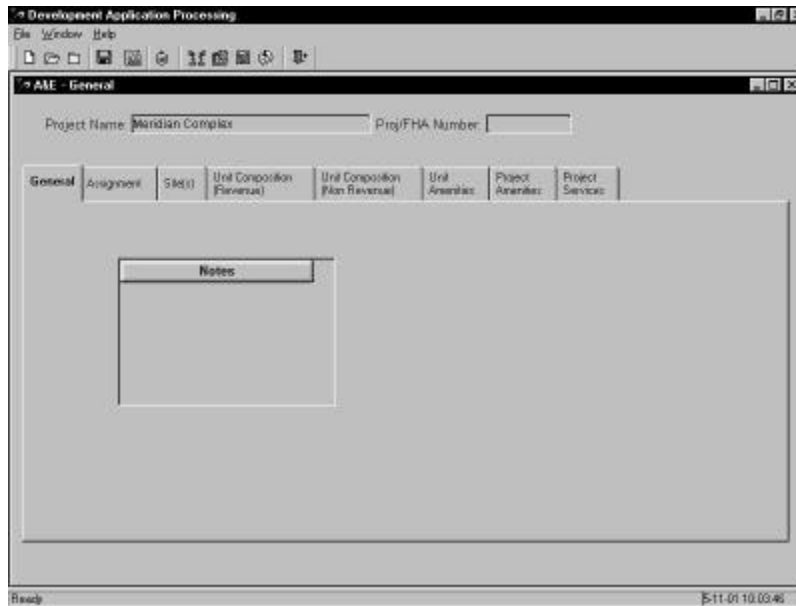
Figure 4-6. General Window - General Tab

To enter a note:

1. Select the General tab, and the **General** window displays.

2. From the **File** menu, select **New**, and the **General Notes** window (Figure 4-7) displays.

Figure 4-7. General Notes Window

3. Enter your notes. The window is designed to allow the text to wrap.

4. Click on [**OK**] to save the note and return to the **General** window (Figure 4-8).
    The system displays the first few characters of the note.
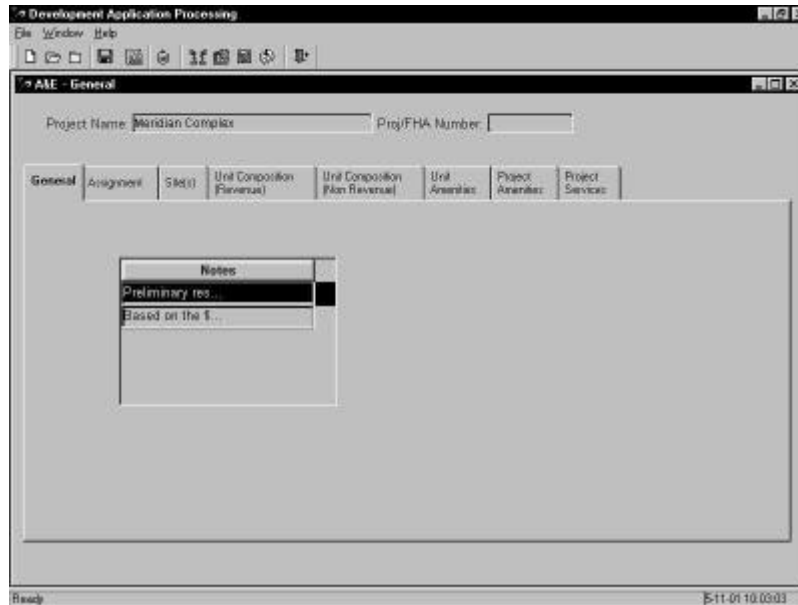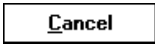
Figure 4-8. General Window - General Tab with Notes

5. Save your work.
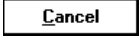
To edit a note:

1. Select the General tab, and the **General** window displays.

2. Select the note you want to change.

3. From the **File** menu, select **Open**, and the **General Notes** window (Figure 4-7) displays.

4. Enter the new data.

    If you overwrite text by mistake, click on [Cancel] and repeat steps 1 through 4.

3. Click on [OK] to close the **General Notes** window, and the **General** window displays.

4. Save your work.

If notes already exist, press the End key to begin your comments after the last note. If you inadvertently overwrite any existing comments, click on [Cancel] to return to the General tab and start again by repeating steps 2 through 4).

To delete notes:

1. Select the General tab, and the **General** window displays.

2. Select the note you want to delete.

3. Click on the right mouse button, and the **Edit** menu opens.

4. Select the **Delete** option, and the Confirm Delete message displays asking are you sure you want to delete the item.

5. Click on ⬚ Yes ⬚ to delete the note.

6. Save your work.

    Alternative Option
    Restore the deleted item before saving (see the restore procedure below). Otherwise, after you save, the restore option is not available.

To restore deleted notes:

1. Select the General tab, and the **General** window displays.

2. Move the mouse pointer inside the list box, and click on the right mouse button to open the **Edit** menu.

3. Select **Restore**, and the **Restore** window displays.

4. Select the item you want to restore.

    Alternative Option
    Click on ⬚ Select All ⬚ to select all items or ⬚ Invert Selection ⬚ to select and de-select items.

5. Click on ⬚ OK ⬚, and the deleted note(s) displays in the Notes list box on the **General** window.

6. Save your work.

4.2.3   Assignment Tab

The Assignment tab on the **Assignment** window (Figure 4-9) is the second tab in the A&E subsystem. You select this tab to begin and end an A&E assignment. Notes that were entered in Tracking can be viewed only from the Tracking subsystem.

The Assignment tab is divided into three sections: background information, assignment dates, and staff member responsible for the A&E analysis. Most of the data is view only and originated in the Tracking subsystem, except for the *Start Date* and *Complete Date*.

Figure 4-9. Assignment Window - Assignment Tab

When you finish processing the assignment, enter the *Complete* date. All of the required data must be present for the system to accept the *Complete* date and save the data. If it is not, the system prompts you with a window listing all missing data.

Changes can be made to the analysis at any time up until the point that the *Complete* date is accepted. After the analysis is saved, no changes can be made to the analysis.

To change or update the analysis after the *Complete* date is accepted, a new assignment must be created in Tracking, and you must perform a new analysis.

To enter a start date for the A&E analysis:

1. Select the Assignment tab, and the **Assignment** window displays.

2. Enter the current date (MM/DD/YYYY) in the *Start Date* field.

3. Save your work.

To enter a complete date for the A&E analysis:

1. Select the Assignment tab, and the **Assignment** window displays.

2. Enter the current date (MM/DD/YYYY) in the *Complete Date* field.

3. Save your work.

   If all required data has been entered and the complete date is accepted by the system, the A&E assignment is closed.

   If additional data is required, the **Completion Information Required** window (Figure 4-10) displays a list of errors describing the data needed. All errors must be resolved in order to close the assignment.
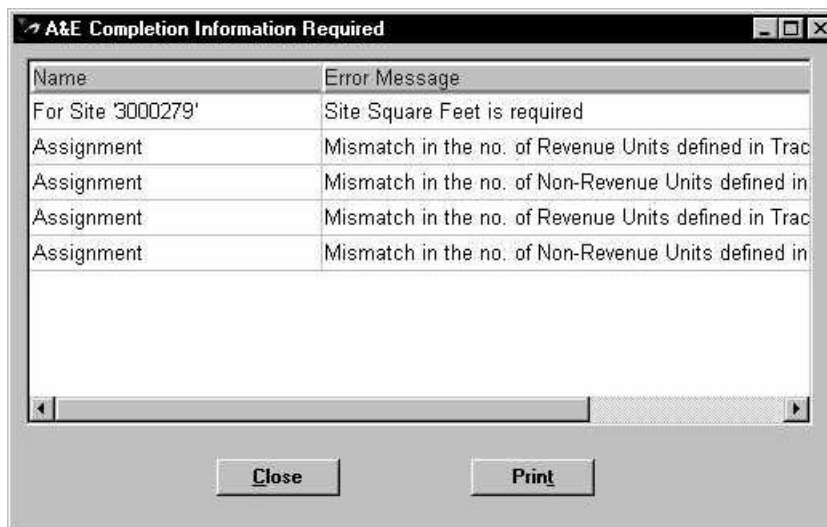
Figure 4-10. Completion Information Required Window

4.2.4   Site(s) Tab

The Site(s) tab on the **Sites(s)** window (Figure 4-11) is the third tab in the A&E subsystem. It displays each site that was included in the project application and entered in the Tracking subsystem. You can add and edit site information.
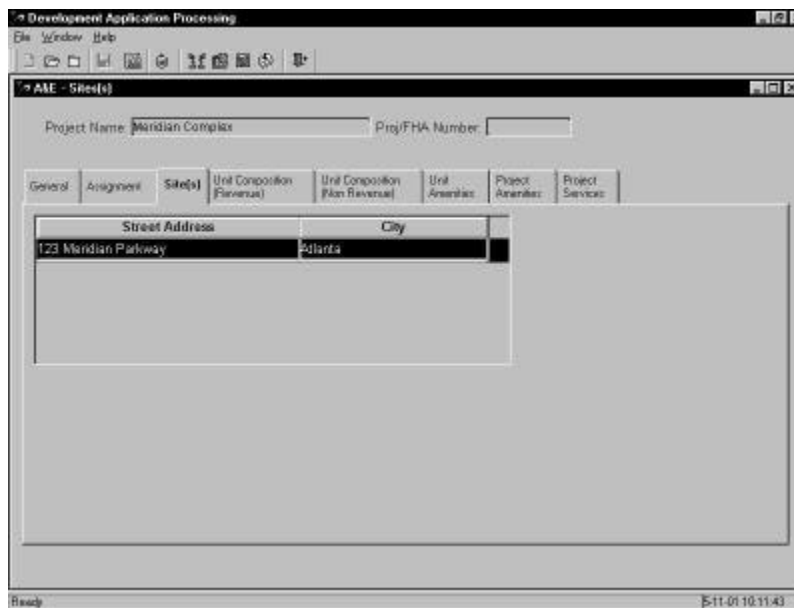
Figure 4-11. Site(s) Window - Site(s) Tab

To display site information:

1. Select the Site(s) tab, and the **Site(s)** window displays

2. Select the site you want to open.

3. From the **File** menu, select **Open**, and the **Site Info - General** window displays.

4.2.4.1   General Tab

The General tab on the **Site Info - General** window (Figure 4-12) displays information in three
sections: site, parking, and commercial income information. Enter data in whole numbers, and the
system will format the information. You can add and edit data on this tab.

Figure 4-12. Site Info - General Window

To add details about a site:

1. Select the Site(s) tab, and the **Site(s)** window displays.

2. Select the site you want to open.

3. From the **File** menu, select **Open**, and the General tab on the **Site Info - General** window
    (Figure 4-12) displays.

4. Enter the site information:
    - *Site Name;*
    - *Site Square Feet;*
    - *Site Acres; and*
    - *Zoning.*

5. Enter the parking information:
    - *Attended; and*
    - *Self.*

6. Enter the commercial income information:

- *Area Grown Level; and*
- *Other Levels.*

7. Save your work.

To edit details about each site:

1. Select the Site(s) tab, and the **Site(s)** window displays.

2. Select the site you want to change.

3. From the **File** menu, select **Open**, and the General tab on the **Site Info - General** window (Figure 4-12) displays.

4. Enter the new data.

5. Save your work.

4.2.4.2   Dwelling Structures Tab

The Dwelling Structures tab on the **Site Info - Dwelling Structure** window (Figure 4-13) displays all buildings associated with the project. An existing structure and its related information can be copied into this tab (see Section 4.2.4.2.1,

Copying Structure Information). You can add, edit, and delete structures. You can also restore or undo deletions before leaving the A&E subsystem.
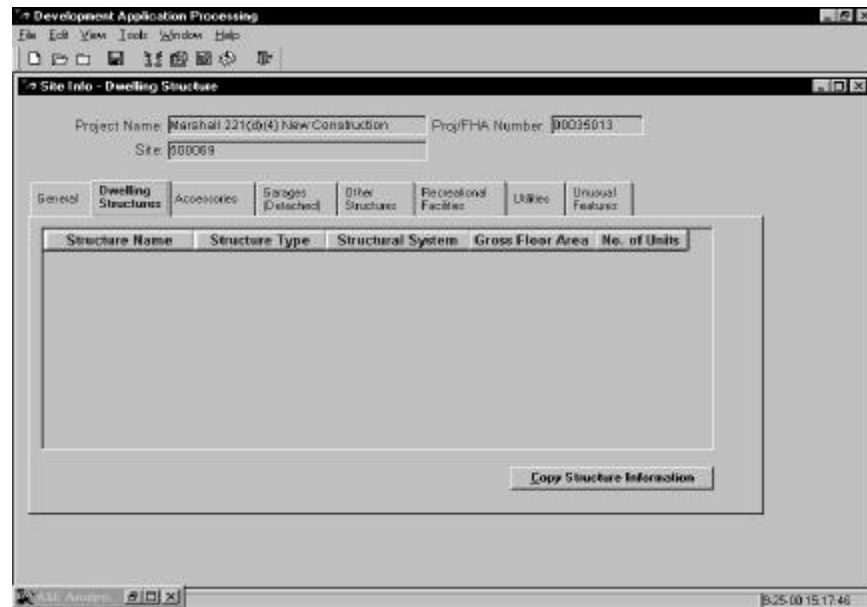
Figure 4-13. Site Info - Dwelling Structure Window - Dwelling Structures Tab

To add a dwelling structure:

1. Select the Dwelling Structures tab, and the **Site Info - Dwelling Structure** window
    (Figure 4-13) displays.

2. From the **File** menu, select **New**, and the **Site Info Dwelling Structure** window displays
    (Figure 4-14 and Figure 4-15).

Figure 4-14. Site Info Dwelling Structure Window (1 of 2)

Figure 4-15. Site Info Dwelling Structure Window (2 of 2)

3. Enter the project information:

    - *Structure Name;*

    - *Year Built* (enter year if structure is already built, e.g., rehab, refi, acquisition)*;*

    - *Building Type* from the drop-down list;

    - *Construction Type* from the drop-down list;

    - *No. of Elevators* from the drop-down list;

    - *Structural System* from the drop-down list;

    - *No. of Stories* from the drop-down list;

    - *Floor System* from the drop-down list;

    - *Foundation Type* from the drop-down list;

    - *Exterior Finish* from the drop-down list;

    - *Basement Floor Type* from the drop-down list;

    - *Heating System* from the drop-down list;

    - *Revenue Units;*

    - *A/C System* from the drop-down list; and

    - *Non Revenue Units.*

4. Enter the dwelling building areas information:

    - *Gross Floor Area;*

    - *Basement, Storage Area;*

    - *Built In Garage* (select a radio button);

    - *Built In Garage Area;*

    - *Lobby Area;*

    - *Halls, Stairs, Elev. Area;*

    - *Net* (enter a description of other areas, maximum of three)*;*

    - *Area* (enter square feet for other areas, maximum of three);and

    - *Residual Area.*

5. Click on [**OK**] to return to the **Site Info - Dwelling Structure** window (Figure 4-13) displays.

    Alternate Option

    Click on [**Add**] to save the current entries and clear all the fields. Add more dwelling structures using steps 4 and 8.

6. Save your work.

To edit dwelling structure information:

1. Select the Dwelling Structures tab, and the **Site Info - Dwelling Structure** window (Figure 4-13) displays.

2. From the **File** menu, select **New**, and the **Site Info Dwelling Structure** window displays (Figure 4-14 and Figure 4-15).

3. Click on the data field you want to change.

4. Enter the new data.

5. Click on [**OK**] to return to the **Site Info - Dwelling Structure** window.

6. Save your work.

To delete a dwelling structure:

1. Select the Dwelling Structures tab, and the **Site Info - Dwelling Structure** window (Figure 4-13) displays.

2. Select the structure you want to delete.

3. Click on the right mouse button, and the **Edit** menu opens.

4. Select the **Delete** option, and the Confirm Delete message displays asking are you sure you want to delete the item.

5. Click on [Yes] to delete the structure.

6. Save your work.

   Alternative Option
   Restore the deleted item before saving (see the restore procedure below). Otherwise, after you save, the restore option is not available.

To restore a deleted dwelling structure:

1. Select the Dwelling Structures tab, and the **Site Info - Dwelling Structure** window (Figure 4-13) displays.

2. Move the mouse pointer inside the list box, and click on the right mouse button to open the **Edit** menu.

3. Select **Restore**, and the **Restore** window displays.

4. Select the item you want to restore.

Alternative Option

Click on [Select All] to select all items or [Invert Selection] to select and de-select items.

5. Click on [OK], and the deleted dwelling structure displays in the **Site Info - Dwelling Structure** window.

6. Save your work.

4.2.4.2.1   Copying Structure Information

The **Site Info - Dwelling Structure** window (Figure 4-13) displays the Copy Structure Information button. This button allows you to make multiple copies of information from an existing structure for another property in the project. Use this time saving feature when there are additional structures in the project that contain identical or similar information. You can copy a structure from any property in the project. After it is copied, you can edit and delete the information. You can also restore or undo deletions before leaving the A&E subsystem.

To copy a structure:

1. Select the Dwelling Structures tab, and the **Site Info - Dwelling Structure** window (Figure 4-13) displays.

2. Select the structure you want to copy.

3. Click on **Copy Structure Information**, and the **Copy Structure** window (Figure 4-16) displays the selected structure.
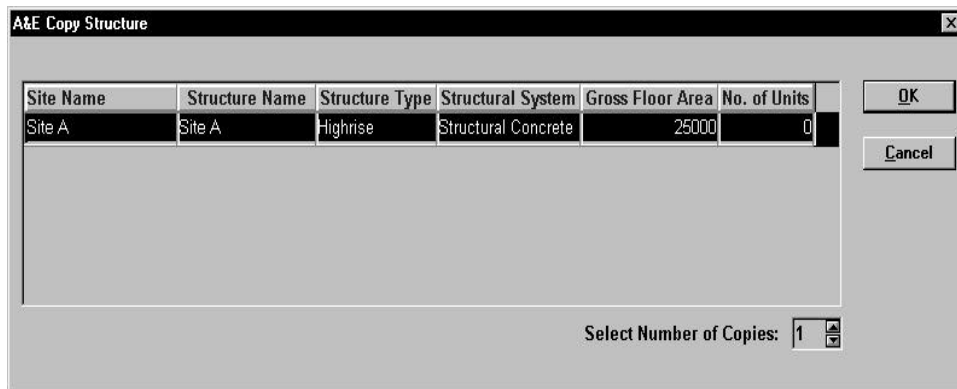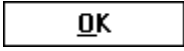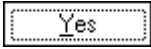

Figure 4-16. Copy Structure Window

4. Click on ⬍ to select the number of copies.

5. Click on **OK**, and the Dwelling Structures tab displays the copied structure(s).

6. Save your work.

To edit copied structure information:

1. Select the Dwelling Structures tab, and the **Site Info - Dwelling Structure** window (Figure 4-13) displays.

2. Select the structure you want to change.

3. From the **File** menu, select **Open**, and the **Site Info Dwelling Structure** window (Figure 4-14 and Figure 4-15) displays.

4. Click on the data field you want to change.

5. Enter the new data.

6. Click on [**OK**] to return to the **Site Info - Dwelling Structure** window.

7. Save your work.

To delete copied structure information:

1. Select the Dwelling Structures tab, and the **Site Info - Dwelling Structure** window (Figure 4-13) displays.

2. Select the structure you want to delete.

3. Click on the right mouse button, and the **Edit** menu opens.

4. Select the **Delete** option, and the Confirm Delete message displays asking are you sure you want to delete the item.

5. Click on [Yes] to delete the structure.

6. Save your work.

    Alternative Option
    Restore the deleted item before saving (see the restore procedure below). Otherwise, after you save, the restore option is not available.

To restore a deleted dwelling structure:

1. Select the Dwelling Structures tab, and the **Site Info - Dwelling Structure** window (Figure 4-13) displays.

2. Move the mouse pointer inside the list box, and click on the right mouse button to open the **Edit** menu.

3. Select **Restore**, and the **Restore** window displays.

4. Select the item you want to restore.

    Alternative Option

Click on [Select All] to select all items or [Invert Selection] to select and de-select items.

5. Click on [OK], and the deleted structure displays in the **Site Info - Dwelling Structure** window.

6. Save your work.

4.2.4.3   Accessories Tab

The Accessories tab on the **Site Info - Accessories** window (Figure 4-17) allows you to enter
accessory structures associated with the property and its dimensions. All accessories must be
entered in the Accessories tab. Examples of accessories are a clubhouse, computer room, laundry
room, etc. There is initially no information in this tab for a new A&E assignment. You can add,
edit, and delete accessories. You can also restore or undo deletions before leaving the A&E
subsystem.
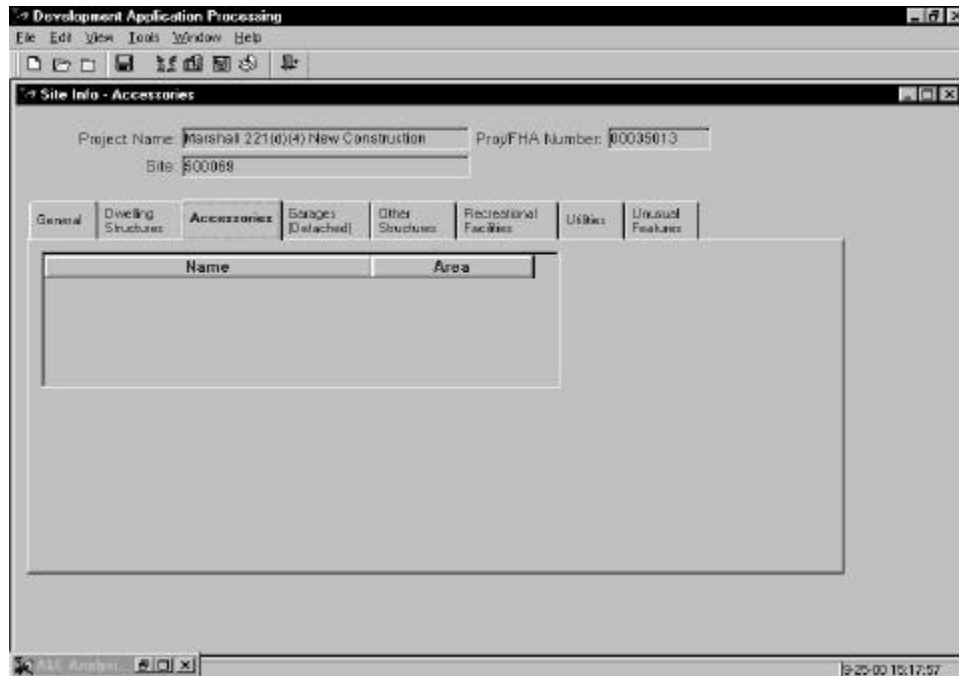
Figure 4-17. Site Info - Accessories Window - Accessories Tab

To add accessories:

1. Select the Accessories tab, and the **Site Info - Accessories** window (Figure 4-17)
    displays.

2. From the **File** menu, select **New**, and the **Site Info - Accessories Maintenance** window
    (Figure 4-18) displays.
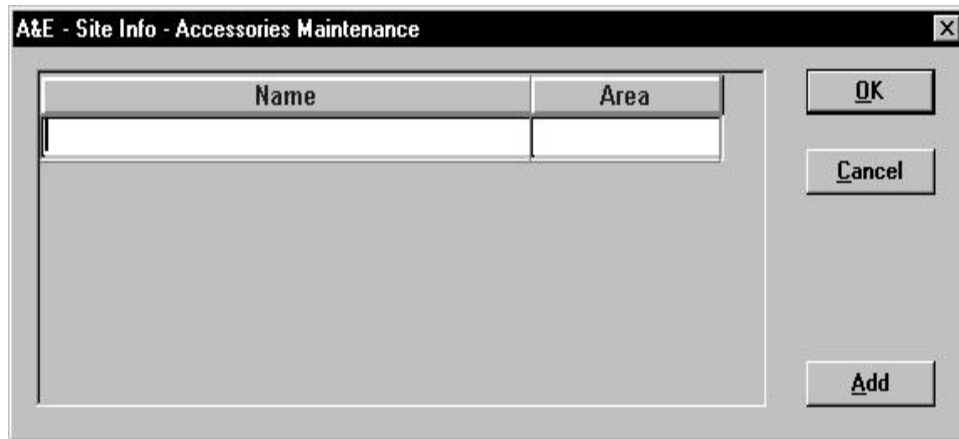
Figure 4-18. Site Info - Accessories Maintenance Window

3. Enter the new data.

4. Click on [**Add**] to insert a blank line and continue adding new accessory structures.

5. Click on [**OK**] to return to the **Site Info - Accessories** window.

6. Save your work.

To edit an accessory:

1. Select the Accessories tab, and the **Site Info - Accessories** window (Figure 4-17)
    displays.

2. Select the accessory you want to change.

3. From the **File** menu, select **Open**, and the **Site Info - Accessories Maintenance** window
    (Figure 4-18) displays all existing accessories.

4. Click on the data field you want to change.

5. Enter the new data.

6. Click on [**OK**] to save the changes and return to the **Site Info - Accessories**
    window.

7. Save your work.

To delete an accessory:

1. Select the Accessories tab, and the **Site Info - Accessories** window (Figure 4-17)
    displays.

2. Select the accessory you want to delete.

3. Click on the right mouse button, and the **Edit** menu opens.

4. Select the **Delete** option, and the Confirm Delete message displays asking are you sure
    you want to delete the item.

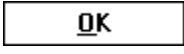5. Click on [Yes] to delete the accessory.

6. Save your work.
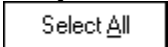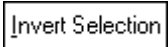
    Alternative Option
    Restore the deleted item before saving (see the restore procedure below). Otherwise, after
    you save, the restore option is not available.

To restore a deleted accessory:

1. Select the Accessories tab, and the **Site Info - Accessories** window (Figure 4-17)
    displays.

2. Move the mouse pointer inside the list box, and click on the right mouse button to open
    the **Edit** menu.

3. Select **Restore**, and the **Restore** window displays.

4. Select the item you want to restore.

    Alternative Option
    Click on [Select All] to select all items or [Invert Selection] to select and de-select items.

3. Click on [OK], and the deleted accessory displays in the **Site Info - Accessories**
    window.

4. Save your work.

4.2.4.4   Garages (Detached) Tab

The Garages (Detached) tab on the **Site Info - Garages (Detached)** window (Figure 4-19) lists each garage that is detached from the property building. You can add, edit, and delete garage information. You can also restore or undo deletions before leaving the A&E subsystem.
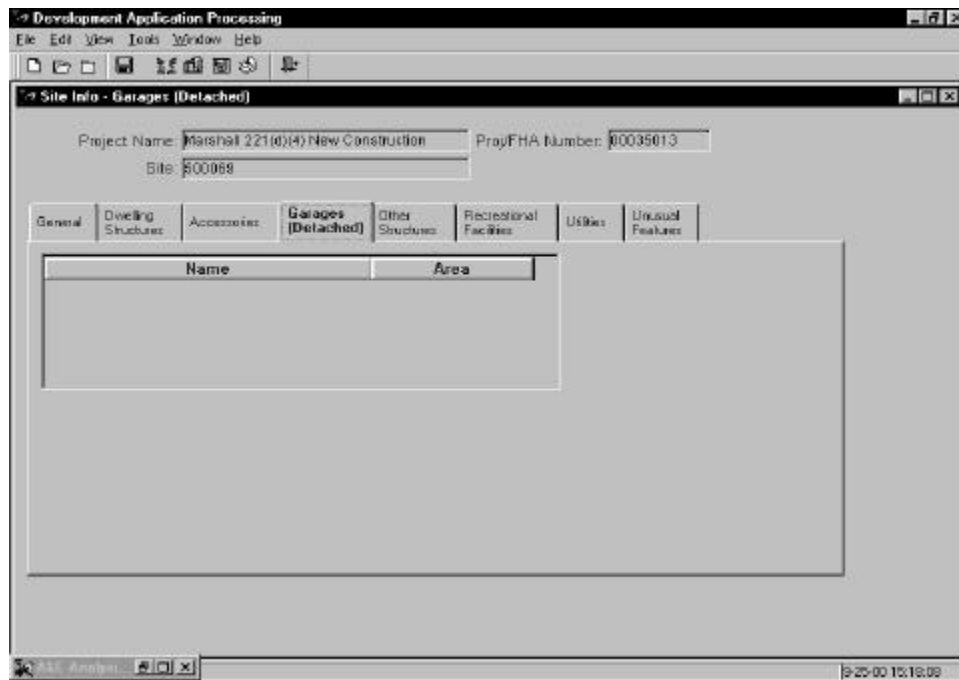

Figure 4-19. Site Info - Garages (Detached) Window - Garages (Detached) Tab

To add a garage:

1. Select the Garage (Detached) tab, and the **Site Info - Garages (Detached)** window (Figure 4-19) displays.

2. From the **File** menu, select **New**, and the **Site Info - Garages Maintenance** window (Figure 4-20) displays.
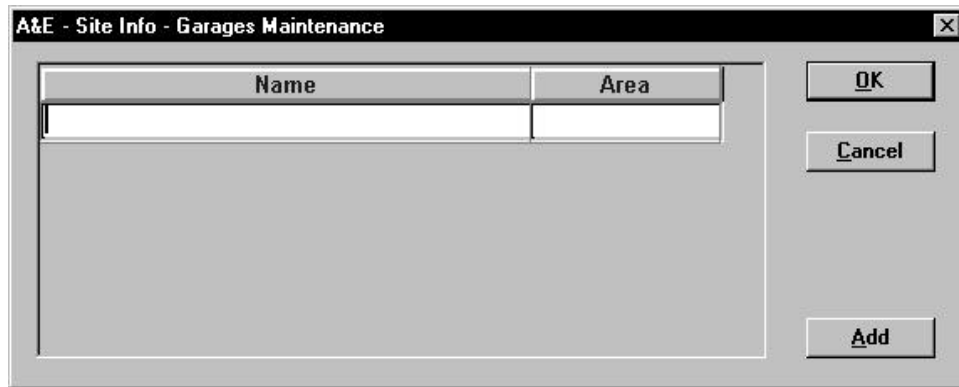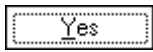
Figure 4-20. Site Info - Garages Maintenance Window

3. Enter the new data.

4. Click on [**Add**] to insert a blank line and continue adding new accessory structures.

5. Click on [**OK**] to return to the **Site Info - Garages (Detached)** window.

6. Save your work.

To edit a garage:

1. Select the Garage (Detached) tab, and the **Site Info - Garages (Detached)** window (Figure 4-19) displays.

2. Click on the garage you want to change.

3. From the **File** menu, select **Open**, and the **Site Info - Garages Maintenance** window displays.

4. Enter the new data.

5. Click on [**OK**] to return to the **Site Info - Garages (Detached)** window.

6. Save your work.

To delete a garage:

1. Select the Garage (Detached) tab, and the **Site Info - Garages (Detached)** window (Figure 4-19) displays.

2. Select the garage you want to delete.

3. Click on the right mouse button, and the **Edit** menu opens.

4. Select the **Delete** option, and the Confirm Delete message displays asking are you sure you want to delete the item.

5. Click on ⬚ Yes ⬚ to delete the garage.
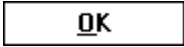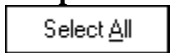
6. Save your work.
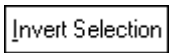
    Alternative Option
    Restore the deleted item before saving (see the restore procedure below). Otherwise, after you save, the restore option is not available.
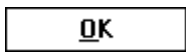
To restore a deleted garage:

1. Select the Garage (Detached) tab, and the **Site Info - Garages (Detached)** window (Figure 4-19) displays.

2. Move the mouse pointer inside the list box, and click on the right mouse button to open the **Edit** menu.

3. Select **Restore**, and the **Restore** window displays.

4. Select the item you want to restore.

    Alternative Option
    Click on ⬚ Select All ⬚ to select all items or ⬚ Invert Selection ⬚ to select and de-select items.

5. Click on ⬚ OK ⬚, and the deleted garage displays in the **Site Info - Garages (Detached)** window.

6. Save your work.

4.2.4.5   Other Structures Tab

The Other Structures tab on the **Site Info - Other Structures** window (Figure 4-21) is where you enter the name of all other structures on the property and their dimensions. This excludes dwellings, accessory structures, and garages that you entered in Sections 4.2.4.2 through 4.2.4.4. You can add, edit, and delete other structures. You can also restore or undo deletions before leaving the A&E subsystem.
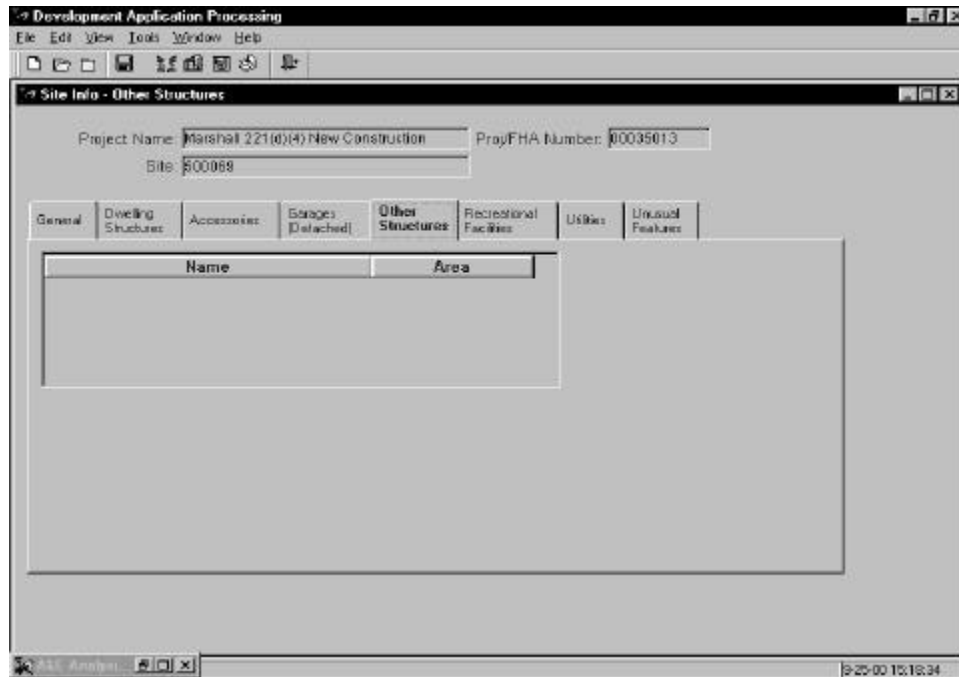

Figure 4-21. Site Info - Other Structures Window - Other Structures Tab

To add other structures:

1. Select the Other structures tab, and the **Site Info - Other Structures** window
    (Figure 4-21) displays.

2. Click on **File** and select **New**, and the **Site Info - Other Structures Maintenance** window
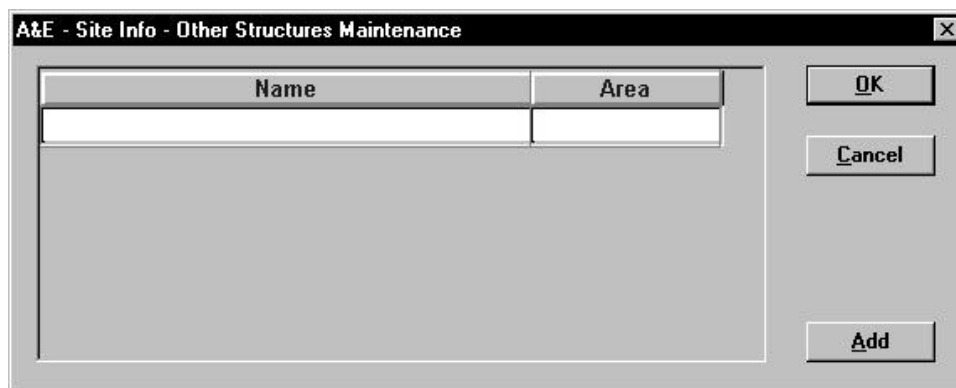   (Figure 4-22) displays.

Figure 4-22. Site Info - Other Structures Maintenance Window

3. Enter the new data.

4. Click on **Add** to continue adding new structures.

5. Click on **OK** after entering the last structure to return to the **Site Info - Other
    Structures Maintenance**.

6. Save your work.

To edit other structures:

1. Select the Other structures tab, and the **Site Info - Other Structures** window
    (Figure 4-21) displays.

2. Select the structure you want to change.

3. From the **File** menu, select **Open**, and the **Site Info - Other Structures Maintenance**
    window (Figure 4-22) displays.

4. Click on the structure you want to change.

5. Enter the new data.

6. Click on **OK** to return to the **Site Info - Other Structures** window displays.

7. Save your work.

To delete other structures:

1. Select the Other structures tab, and the **Site Info - Other Structures** window
    (Figure 4-21) displays.

2. Select the structure you want to delete.

3. Click on the right mouse button, and the **Edit** menu opens.

4. Select the **Delete** option, and the Confirm Delete message displays asking are you sure
    you want to delete the item.

5. delete the item.

6. Click on [Yes] to delete the structure and return to the **Site Info - Garages
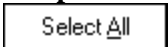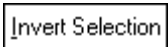   (Detached)** window.

7. Save your work.
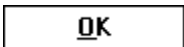
    Alternative Option
    Restore the deleted item before saving (see the restore procedure below). Otherwise, after
    you save, the restore option is not available.

To restore a deleted other structure:

1. Select the Other structures tab, and the **Site Info - Other Structures** window
    (Figure 4-21) displays.

2. Move the mouse pointer inside the list box, and click on the right mouse button to open
    the **Edit** menu.

3. Select **Restore**, and the **Restore** window displays.

4. Select the item you want to restore.

    Alternative Option
    Click on [Select All] to select all items or [Invert Selection] to select and de-select items.

5. Click on [OK] , and the deleted structure displays in the **Site Info - Other
    Structures** window.

6. Save your work.

4.2.4.6   Recreational Facilities Tab

The Recreational Facilities tab on the **Site Info - Recreational Facilities** window (Figure 4-23)
lists each recreational facility located on the property. Examples of recreational facilities are
playgrounds, tennis courts, and swimming pools. You can add, edit, and delete recreational
facilities. You can also restore or undo deletions before leaving the A&E subsystem.
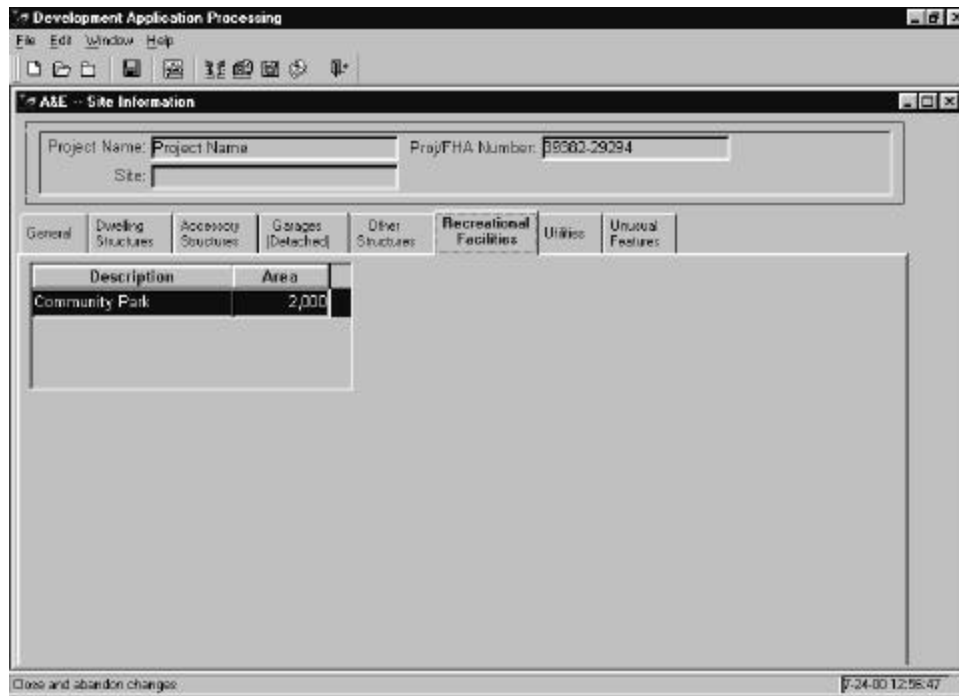

Figure 4-23. Site Info - Recreational Facilities Window Recreational Facilities Tab

To add a recreational facility:

1. Select the Recreational Facilities tab, and the **Site Info - Recreational Facilities** window (Figure 4-19) displays.

2. From the **File** menu, select **New**, and the **Site Info - Recreational Facility Maintenance** window (Figure 4-24) displays a blank row.
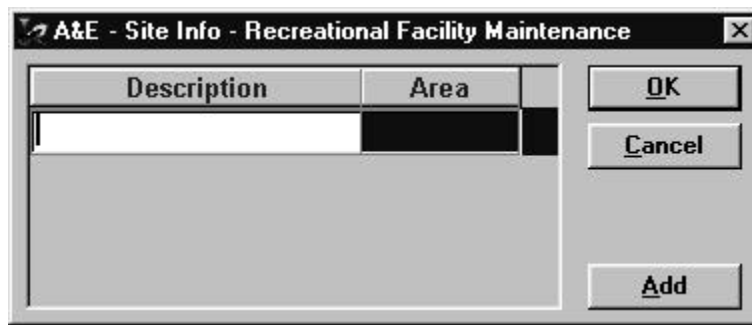

Figure 4-24. Site Info -Recreational Facility Maintenance Window

3. Enter the new data.

4. Click on [**OK**], and the **Recreational Facilities** window displays the new data.
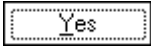
    Alternative Option

    Click on [**Add**] to display a blank line and add more recreational facilities.

5. Save your work.

To edit a recreational facility:

1. Select the Recreational Facilities tab, and the **Site Info - Recreational Facilities** window (Figure 4-19) displays.

2. Click on the facility you want to change.

3. From the **File** menu, select **Open**, and the **Site Info - Recreational Facility Maintenance** window (Figure 4-24) displays.

4. Enter the new data.

5. Click on [**OK**] to return to the **Site Info - Recreational Facilities** window.

6. Save your work.

To delete a recreational facility:

1. Select the Recreational Facilities tab, and the **Site Info - Recreational Facilities** window (Figure 4-19) displays.

2. Select the facility you want to delete.

3. Click on the right mouse button, and the **Edit** menu opens.

4. Select the **Delete** option, and the Confirm Delete message displays asking are you sure you want to delete the item.

5. Click on ⬛ Yes ⬛ to delete the recreational facility and return to the **Site Info - Recreational Facilities** window
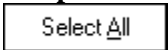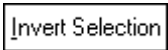
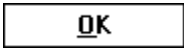6. Save your work.

    Alternative Option
    Restore the deleted item before saving (see the restore procedure below). Otherwise, after you save, the restore option is not available.

To restore a deleted recreational facility:

1. Select the Recreational Facilities tab, and the **Site Info - Recreational Facilities** window (Figure 4-19) displays.

2. Move the mouse pointer inside the list box, and click on the right mouse button to open the **Edit** menu.

3. Select **Restore**, and the **Restore** window displays.

4. Select the item you want to restore.

    Alternative Option
    Click on ⬛ Select All ⬛ to select all items or ⬛ Invert Selection ⬛ to select and de-select items.

5. Click on ⬛ OK ⬛, and the deleted recreational facility displays in the **Recreational Facilities** window.

6. Save your work.

4.2.4.7 Utilities Tab

The Utilities tab on the **Site Info - Utilities** window (Figure 4-25) displays two utility types: *Water* and *Sewer*. You can indicate whether the water and sewer utilities are part of a public utility system or a community utility system. You can also note how far the utilities are from the property's site. You can enter and edit utility information.
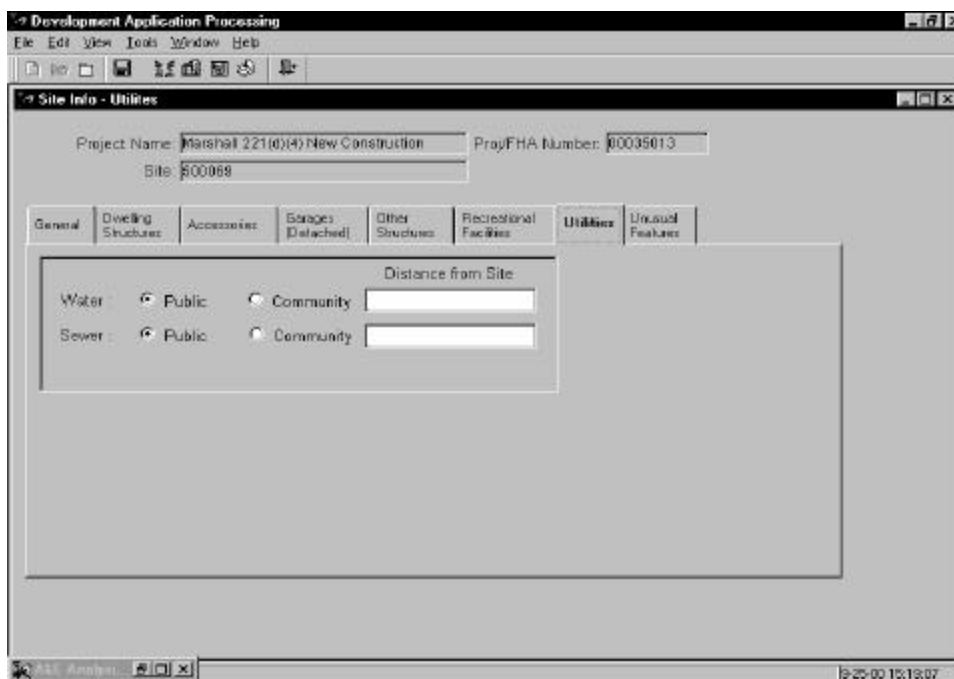

Figure 4-25. Site Info - Utilities Window - Utilities Tab

To enter utility information:

1. Select the Utilities Tab, and the **Site Info - Utilities** window displays.

2. Select the type of water utility, and enter the distance in feet from the site.

3. Select the type of sewer utility, and enter the distance in feet from the site.

4. Save your work.

To edit utility information:

1. Select the Utilities Tab, and the **Site Info - Utilities** window displays.

2. Click on the data field you want to change.

3. Enter the new data.

4. Save your work.

4.2.4.8   Unusual Features Tab

The Unusual Features tab on the **Site Info - Unusual Features** window (Figure 4-26) lists any
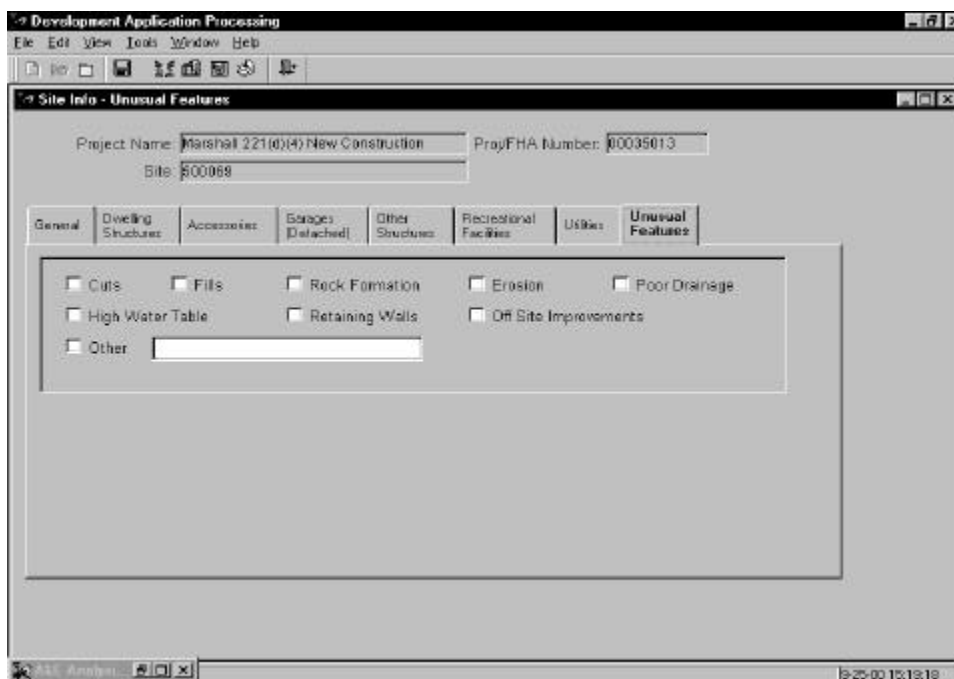unusual site conditions on the property. You can select and de-select an item.

Figure 4-26. Site Info - Unusual Features Window - Unusual Features Tab

To select unusual features:

1. Select the Unusual Features tab, and the **Site Info - Unusual Features** window displays.

2. Select the check boxes next to the features that you need. An "**x**" indicates the item is
   selected.

3. Save your work.

4. From the **File** menu, select **Close**, and the **Site(s)** window displays.

To de-select unusual features:

1. Select the Unusual Features tab, and the **Site Info - Unusual Features** window displays.

2. Select the check boxes next to the appropriate items. The "**x**" no longer displays.

3. Save your work.

4. From the **File** menu, select **Close**, and the **Site(s)** window displays.

4.2.5   Unit Composition (Revenue) Tab

The Unit Composition (Revenue) tab on the **Unit Composition (Revenue)** window (Figure 4-27) allows you to define the characteristics of each revenue unit in a project. A summary of all entries display on this tab by unit type. Unit type is based on the number of bedrooms in a unit. Revenue unit composition data is linked to the entire project, not to a specific property in a project. You can add, edit, and delete unit information. You can also restore or undo deletions before leaving the A&E subsystem.
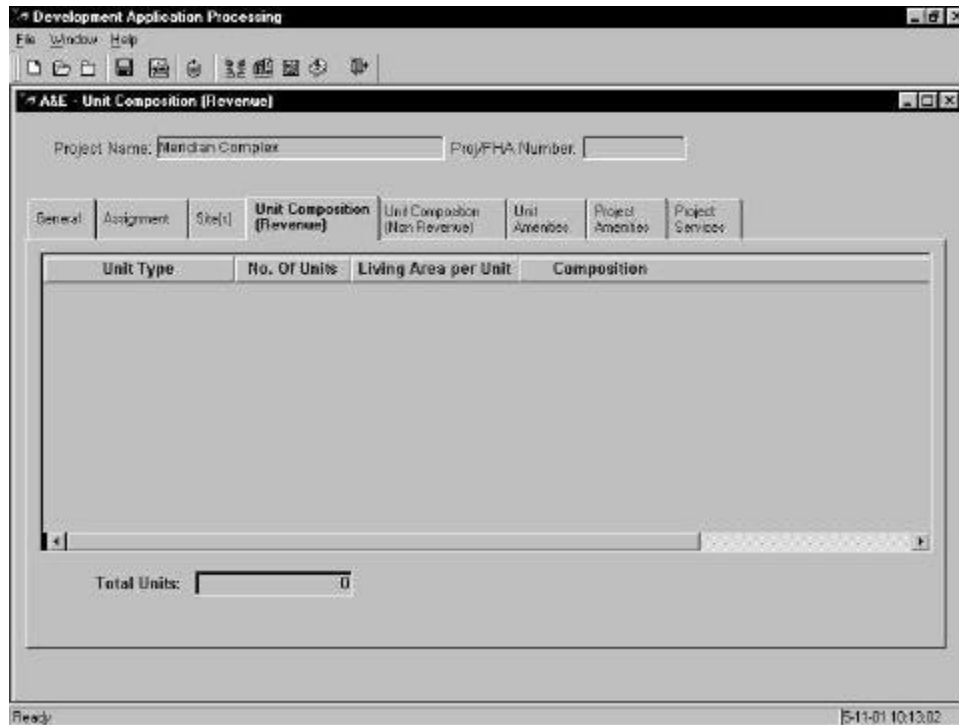

Figure 4-27. Unit Composition (Revenue) Window - Unit Composition (Revenue) Tab

To add unit composition data:

1. Select the Unit Composition (Revenue) tab, and the **Unit Composition (Revenue)** window displays.

2. From the **File** menu, select **New**, and the **Unit Composition (Revenue)** detail window (Figure 4-28) displays.

Figure 4-28. Unit Composition (Revenue) Detail Window

3. Enter the unit composition (revenue) information:

   - *Unit Type* from the drop-down list*;*

   - *No. of Units;*

   - *Living Area;*

   - *Elevator Status*, select the radio button*;*

> ✍ *Note:*   Statutory Limit *automatically calculates after* Unit Type Code *and* Elevator Status *are entered. Subsequently, if either value changes, the* Statutory Limit *field is updated.*

4. Click on **Composition Assignment**, and the **Composition of Units** window (Figure 4-29) displays.
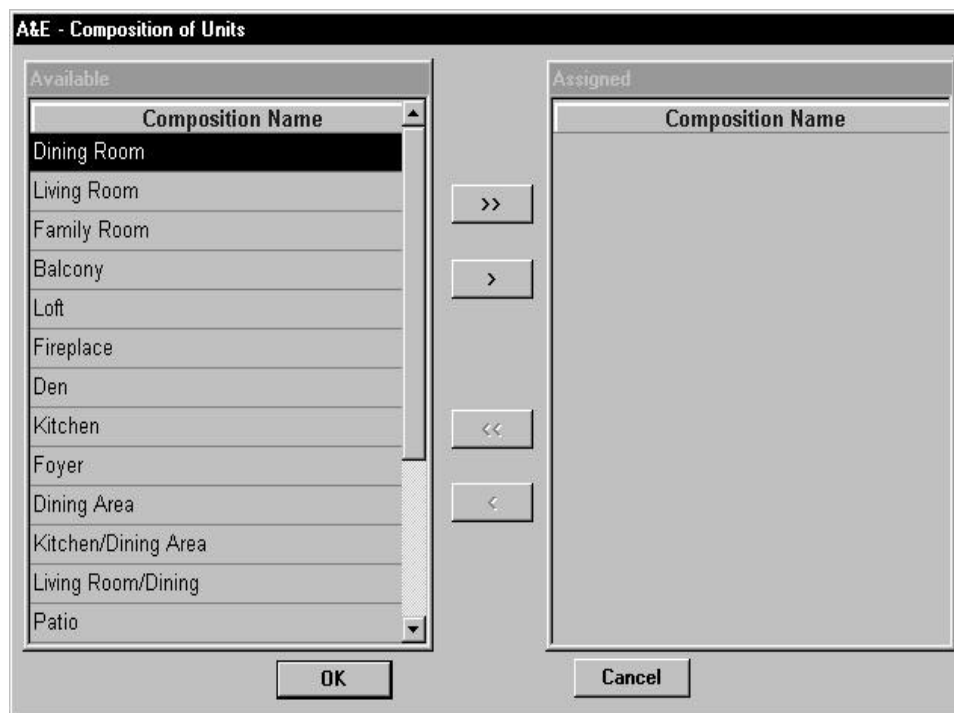

Figure 4-29. Composition of Units Window

The **Composition of Units** window (Figure 4-29) consist of two list boxes. The Available list box contains the options you can select to define the unit type. The Assigned list box displays all selected options.

5. Select an option from the Available list box, and click on [>] to move the option to the Assigned list box.
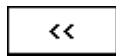
Alternative Option

Click on [>>] to move all options from the Available list box to the Assigned box.

6. Continue selecting options and clicking [>] until all appropriate options have been assigned.

OR

Remove options from the Assigned list box and return them to the Available box by clicking on:
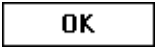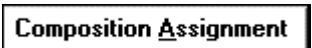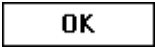
[<] to remove one option, or

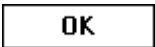 | **<<** | to remove all options.

7. Click on | **OK** | to return to the **Unit Composition** (**Revenue**) detail window.
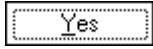

✎   *Note: On the **Unit Composition (Revenue)** detail window, the system default for composition
    quantity is one (1) for each room. You can increase the quantity.*

---

8. Enter the *Quantity* for each room.

9. Click on | **OK** | to return to the **Unit Composition (Revenue)** window.

10. Save your work.

To edit unit composition data:

1. Select the Unit Composition (Revenue) tab, and the **Unit Composition (Revenue)**
    window (Figure 4-27) displays.

2. Select the unit type you want to change.

3. From the **File** menu, select **Open**, and the **Unit Composition (Revenue)** detail window
    (Figure 4-28) displays.

4. Click on the data field you want to change, and enter the new data.

5. Click on | **Composition Assignment** |, and the **Composition of Units** window (Figure 4-29)
    displays.

6. Enter the new data.

7. Click on | **OK** | to return to the **Unit Composition (Revenue)** detail window.

8. Enter the *Quantity* for each room, if applicable.

9. Click on | **OK** | to return to the **Unit Composition (Revenue)** window.

10. Save your work.

To delete unit composition data:

1. Select the Unit Composition (Revenue) tab, and the **Unit Composition (Revenue)** window (Figure 4-27) displays.

2. Select the unit type you want to delete.

3. Click on the right mouse button, and the **Edit** menu opens.

4. Select the **Delete** option, and the Confirm Delete message displays asking are you sure you want to delete the item.

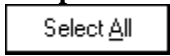5. Click on [Yes] to delete the item.

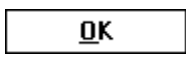6. Save your work.

    Alternative Option
    Restore the deleted item before saving (see the restore procedure below). Otherwise, after you save, the restore option is not available.

To restore unit composition data:

1. Select the Unit Composition (Revenue) tab, and the **Unit Composition (Revenue)** window (Figure 4-27) displays.

2. Move the mouse pointer inside the list box, and click on the right mouse button to open the **Edit** menu.

3. Select **Restore**, and the **Restore** window displays.

4. Select the item you want to restore.

    Alternative Option
    Click on [Select All] to select all items or [Invert Selection] to select and de-select items.

5. Click on [OK], and the deleted composition of rooms displays in the **Unit Composition (Revenue)** window.

6. Save your work.

4.2.6   Unit Composition (Non Revenue) Tab

The Unit Composition (Non Revenue) tab on the **Unit Composition (Non Revenue)** window
(Figure 4-30) allows you to define the characteristics of each Non revenue unit in a project. A
summary of all entries display on this tab by unit type. Unit type is based on the number of
bedrooms in a unit. Revenue unit composition data is linked to the entire project, not to a specific
property in a project. You can add, edit, and delete unit information. You can also restore or
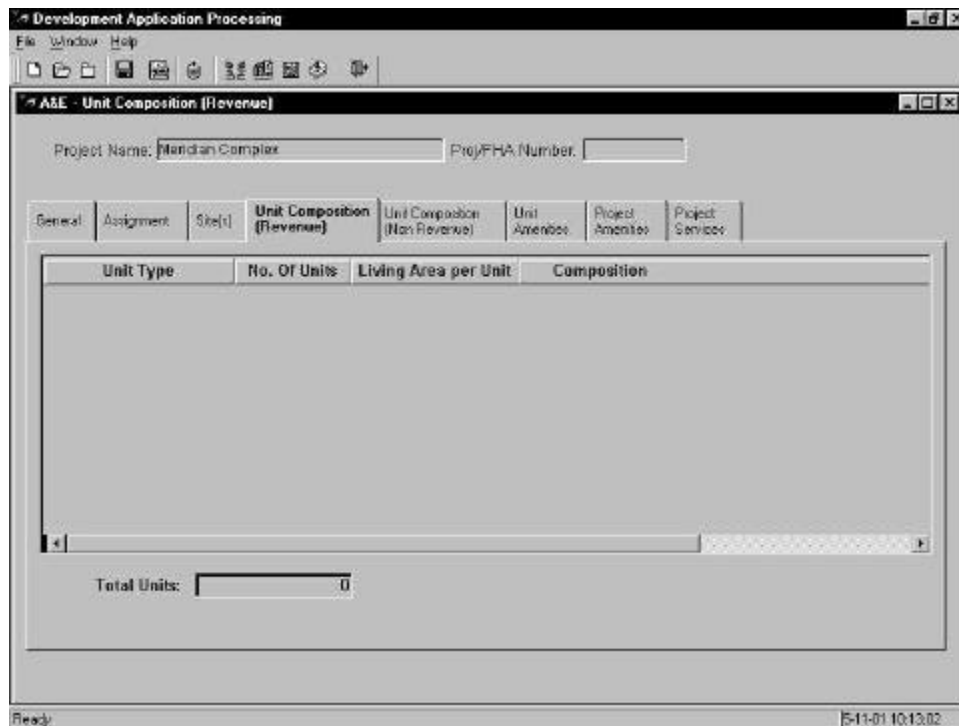undo deletions before leaving the A&E subsystem.

Figure 4-30. Unit Composition (Non Revenue) Window - Unit Composition (Non Revenue) Tab

To add non revenue unit composition information:

1. Select the Unit Composition (Non Revenue) tab, and the **Unit Composition (Non Revenue)** window displays.

2. From the **File** menu, select **New**. The **Unit Composition (Non Revenue)** window (Figure 4-31) displays.

Figure 4-31. Unit Composition (Non Revenue) Detail Window

3. Enter the unit composition (revenue) information:

   - *Unit Type* from the drop-down list*;*

   - *No. of Units;*

   - *Living Area;*

   - *Elevator Status*, select the radio button*;*

✍ *Note:* Statutory Limit *automatically calculates after* Unit Type Code *and* Elevator Status *are entered. Subsequently, if either value changes, the* Statutory Limit *field is updated.*

4.   Click on **Composition Assignment**, and the **Composition of Units** window (Figure 4-32) displays.
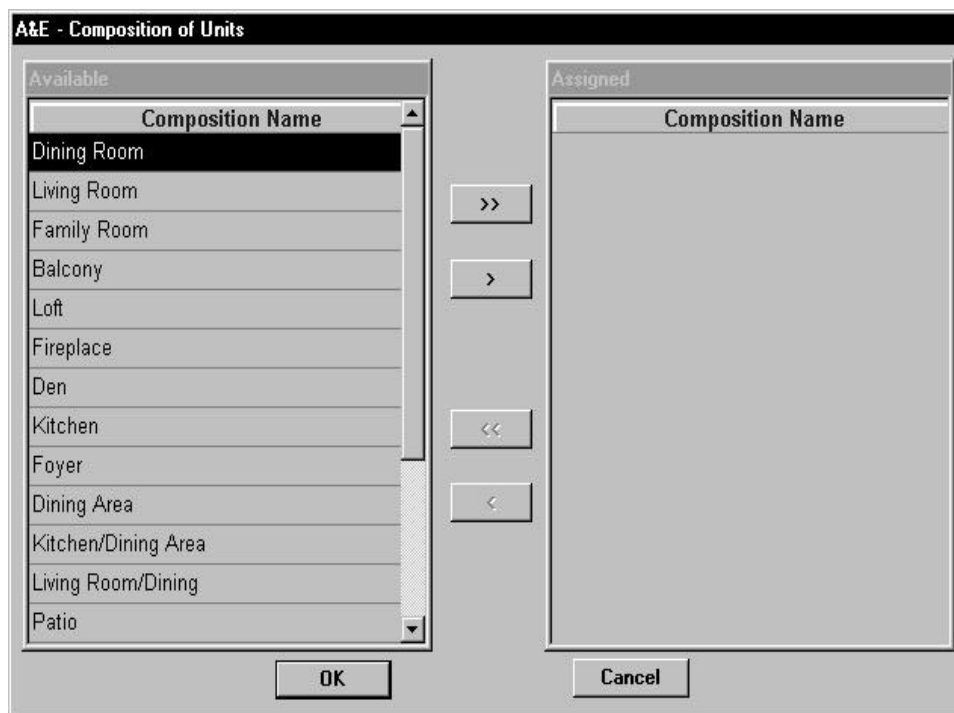

Figure 4-32. Composition of Units Window

The **Composition of Units** window (Figure 4-29) consist of two list boxes. The Available list box contains the options you can select to define the unit type. The Assigned list box displays all selected options.

5.   Select an option from the Available list box, and click on **>** to move the option to the Assigned list box.

Alternative Option

Click on **>>** to move all options from the Available list box to the Assigned box.

6.   Continue selecting options and clicking **>** until all appropriate options have been assigned.

OR

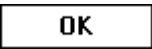Remove options from the Assigned list box and return them to the Available box by clicking on:

< to remove one option, or
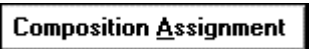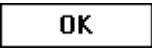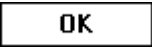
<< to remove all options.

7. Click on **OK** to return to the **Unit Composition (Non Revenue)** detail window.
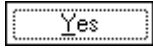
> ✍ *Note: The system default for composition quantity is one (1) for each room. You can increase the quantity.*

8. Enter the *Quantity* for each room.

9. Click on **OK** to return the **Unit Composition (Non Revenue)** window.

10. Save your work.

To edit unit composition data:

1. Select the Unit Composition (Revenue) tab, and the **Unit Composition (Revenue)** window displays.

2. Select the unit type you want to change.

3. From the **File** menu, select **Open**, and the **Unit Composition (Non Revenue)** detail window displays.

4. Click on the data field you want to change, and enter the new data.

5. Click on **Composition Assignment** to edit the options in the unit type, if applicable, and the **Composition of Units** window (Figure 4-29) displays.

6. Enter the new data.

7. Click on **OK** to return to the **Unit Composition (Non Revenue)** detail window.

8. Enter the *Quantity* for each room, if applicable.

9. Click on **OK** to return to the **Unit Composition (Non Revenue)** window.

10. Save your work.

To delete unit composition data:

1. Select the Unit Composition (Revenue) tab, and the **Unit Composition (Non Revenue)** window (Figure 4-30) displays.

2. Select the unit type you want to delete.

3. Click on the right mouse button, and the **Edit** menu opens.

4. Select the **Delete** option, and the Confirm Delete message displays asking are you sure you want to delete the item.

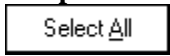5. Click on [Yes] to delete the item.

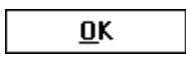6. Save your work.

   Alternative Option
   Restore the deleted item before saving (see the restore procedure below). Otherwise, after you save, the restore option is not available.

To restore unit composition data:

1. Select the Unit Composition (Revenue) tab, and the **Unit Composition (Non Revenue)** window (Figure 4-30) displays.

2. Move the mouse pointer inside the list box, and click on the right mouse button to open the **Edit** menu.

3. Select **Restore**, and the **Restore** window displays.

4. Select the item you want to restore.

   Alternative Option
   Click on [Select All] to select all items or [Invert Selection] to select and de-select items.

5. Click on [OK], and the deleted composition of rooms displays once again on the **Unit Composition (Non Revenue)** window.

6. Save your work.

4.2.7   Unit Amenities Tab

The Unit Amenities tab on the **Unit Amenities** window (Figure 4-33) displays the amenities that could be available in all units. You can select and de-select amenities. Entering descriptions in the *Fireplace(s), Security System(s),* and *Other (specify)* text boxes are optional.
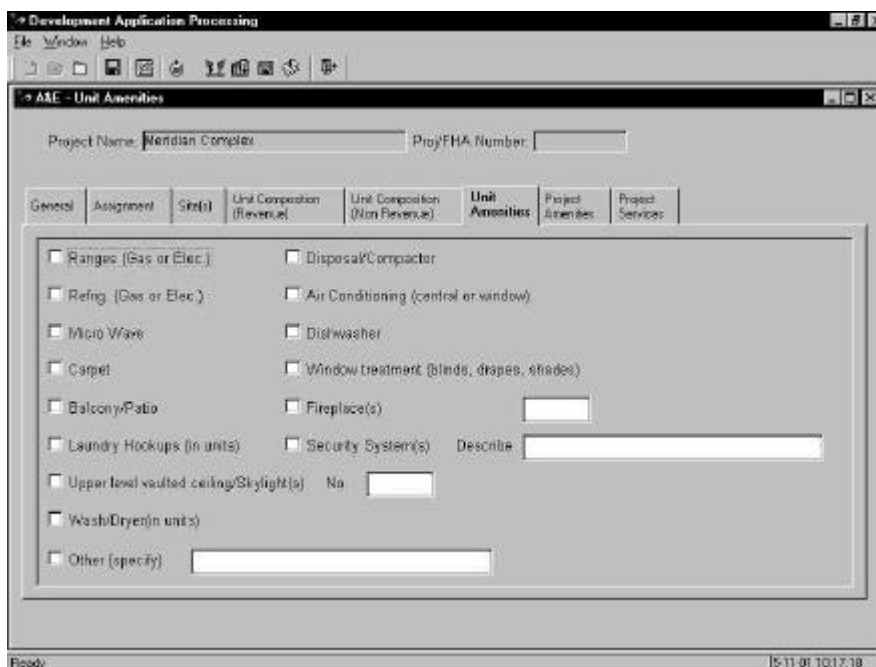

Figure 4-33. Unit Amenities Window - Unit Amenities Tab

To select unit amenities:

1. Select the Unit Amenities tab, and the **Unit Amenities** window displays.

2. Select the check boxes next to the appropriate amenities, and check marks (✔) display indicating the items are selected.

3. Enter brief details in the text boxes for *Fireplace(s), Security System(s),* and *Other (specify)*, if applicable.

4. Save your work.

To de-select unit amenities:

1. Select the Unit Amenities tab, and the **Unit Amenities** window displays.

2. Select the check marks you want to delete, and the check marks (✔) no longer display.

    When you de-select an amenity that has details in its text box, the system deletes the description.

3. Save your work.

4.2.8   Project Amenities Tab

The Project Amenities tab on the **Project Amenities** window (Figure 4-34) allows you to define
the amenities to be used in the entire project. You can select and de-select project amenities.

Figure 4-34. Project Amenities Window - Project Amenities Tab

To select project amenities:

1. Select the Project Amenities tab, and the **Project Amenities** window displays.

2. Select the check boxes next to the appropriate amenities, and check marks (✔) display
    indicating the items are selected.

3. Enter brief details in the text boxes for *Fireplace(s), Security System(s),* and *Other
    (specify)*, if applicable.

4. Save your work.

To de-select project amenities:

1. Select the Project Amenities tab, and the **Project Amenities** window displays.

2. Select the check marks you want to delete, and the check marks (✔) no longer displays.

    When you de-select an amenity that has details in its text box, the system deletes the
    description.

3. Save your work.

4.2.9   Project Services Tab

The Project Services tab on the **Project Services** window (Figure 4-35) allows you to define the services available in the project for all units. The services are listed on the tab by type of utility (Gas, Electric, and Other). One or more services may can be selected per utility type, e.g., for the gas utility, if the project provides gas heat and gas cooking, check the appropriate boxes next to the services. You can select and de-select project services.
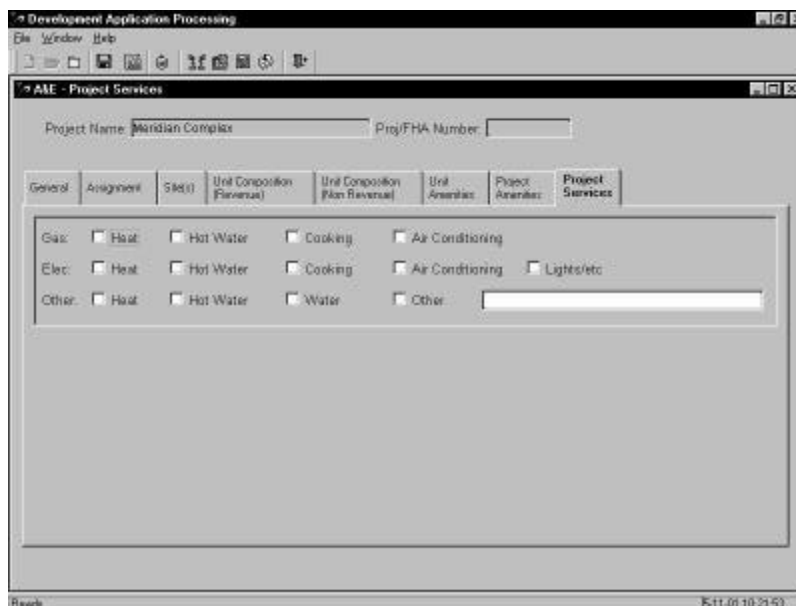

Figure 4-35. Project Services Window - Project Services Tab

To select project services:

1. Select the Project Services tab, and the **Project Services** window displays.

2. Select the check boxes next to the appropriate services that use gas, electricity, and other, and check marks (✔) display in each box indicating the items are selected.

3. Enter brief details in the text box for *Other*, if applicable.

4. Save your work.

To de-select project services:

1. Select the Project Services tab, and the **Project Services** window displays.

2. Select the check marks you want to delete, and the check marks (✔) no longer displays.

    When you de-select an amenity that has details in its text box, the system deletes the description.

3. Save your work.

4.3   Reports

The **Reports** window (Figure 4-36) option allows you to generate several reports associated with the A&E analysis. You can view, print, and save reports. For detailed information, see Chapter 11, Reports.

To generate a report:

1. Select the General tab, and the **General** window displays.

2. From the **File** menu, select **System Reports**, and the **Reports** window (Figure 4-36) displays.
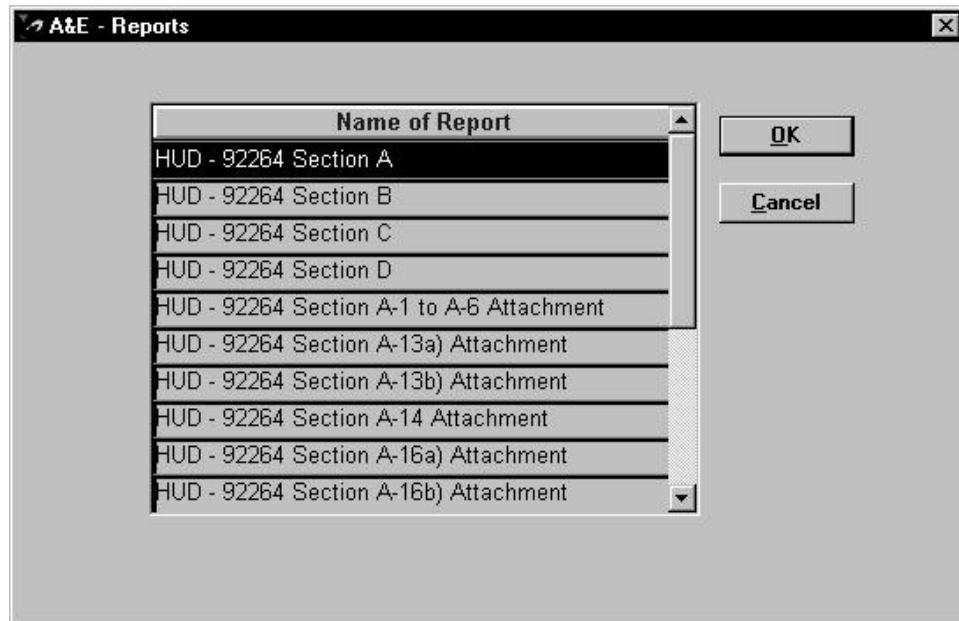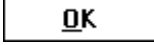

Figure 4-36. Reports Window

3. Select a report, and click on [**OK**], and the report displays in the **Print Preview** window (Figure 4-37).

Figure 4-37. Print Preview Window

4. Click on [**Close**] to close the window, and the **General** window displays.

4.4   Copying from Previous A&E Assignment

After the *Complete Date* is accepted in the Assignment tab, all A&E information is view only. If you need to add or change any information in the closed assignment, a new assignment must be assigned from the Tracking subsystem. The new assignment will only contain data that was entered in the Tracking subsystem. It will not contain the information you entered in the previous assignment. If you can still use most of the data from the previous assignment, the **Copy Analysis** menu option (Figure 4-38) saves you the step of retyping the information. This option copies all information from the previous assignment into the new assignment. You can then add, edit, and delete the information that needs changing.
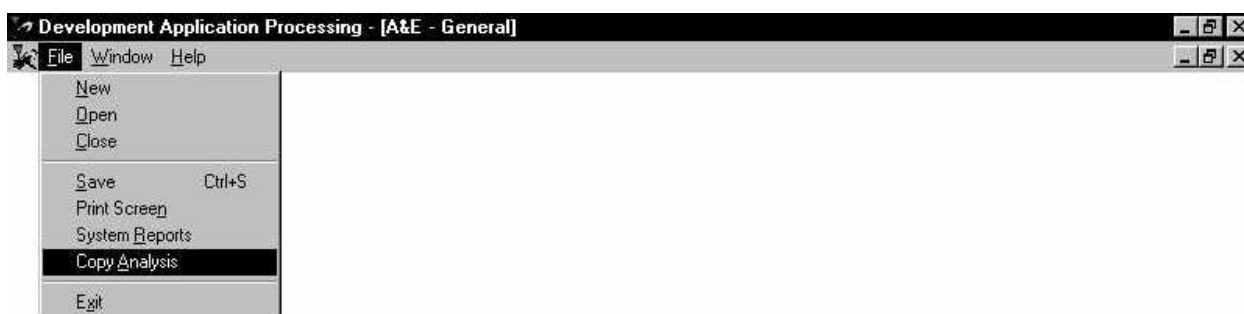

Figure 4-38. Copy Analysis Menu Option

The following information is copied from the previous A&E assignment to the new assignment: all properties and related information, structures and related information, unit composition definitions, and Tracking notes. The related information in the new assignment will be replaced with information from the copied assignment. The previous assignment's *Start Date* and *Complete Date* is the only data that is not copied into the new assignment. You will need to enter current dates in these fields when you begin and end the new analysis.

To copy a previous A&E analysis:

1. From the Assignment tab, enter the current date to close the current assignment (for instructions, refer to Section 4.2.3, Assignment Tab).

2. From the **File** menu, close all project windows and return to the **DAP Main** window.

3. Request a new assignment from the Tracking Analyst.

4. Search the database by the project number, and the **Assignment List** window displays all versions of the assignment for the project (Figure 4-39).

Figure 4-39. Assignment List Window - By Project Number

5. Select the most current version of the A&E assignment from the **Assignment List** window, and the **General** window displays.

6. From the **File** menu, select **Copy Analysis**, and the **Copy from Previous Assignment** window (Figure 4-40) displays all closed assignments.

Figure 4-40. Copy from Previous Assignment Window - Completed Assignments

The **Copy Analysis** menu option becomes active after the Tracking Analyst makes a new

assignment for the project.

7. Select the most current analysis (based on the highest version number).

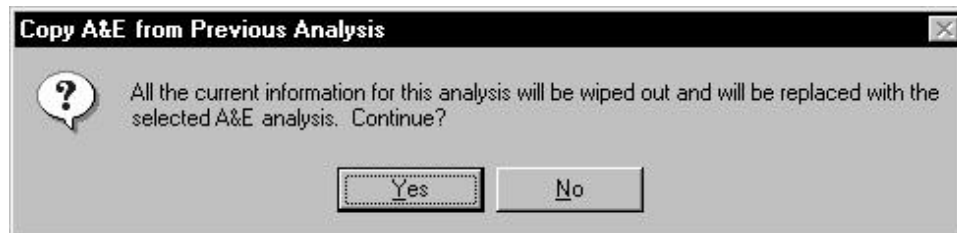8. Click on [OK], and the **Copy from Previous Analysis** dialog box (Figure 4-41) displays.

Figure 4-41. Copy A&E from Previous Analysis Dialog Box

9. Click on [Yes], and the system copies all data from the previous assignment, except the *Complete Date*.

10. From the Assignment Tab, start the A&E analysis (refer to Section 4.2.1, Starting and Ending an A&E Analysis).